

ADDING PARTIES TO THE CM/ECF DATABASE INSTRUCTIONS FOR ATTORNEYS

Rev. 3/30/07

Consistency is critical when entering party names into the computer.

When adding parties, data is entered in various fields of the database (i.e. last name, first name, middle initial, party text, alias, etc.). The instructions below explain how you should enter names in these fields.

FIELD/RECORD DESCRIPTIONS

The following basic guidelines must be used when entering party information:

1. **LAST, FIRST, MIDDLE, GENERATION** - *USED FOR ALL INDIVIDUALS*. The last name field is also used for businesses or organizations. The last name field contains sixty characters. We do not use the Title field so please do not enter anything in this field. If the party has a title, it should be entered in the party text field.
2. **PARTY TEXT** - *USED AS DESCRIPTIVE TEXT ABOUT THE POSITION OF A PARTY IN A CASE* (i.e. o/b/o him/herself & all those similarly situated; Admin Est of John Doe; o/b/o minor child, etc.). It appears after the name on the cover of the docket sheet. A party can have a different party text record for each case; it is specific to that case. It can be changed/added for each case at any time.
3. **ALIAS** - *USED FOR ALL ALIAS NAMES FOR A PARTY* (aka, dba, etc.). It appears after the party text information on the caption of the docket sheet.

GUIDELINES

1. **ADDING NEW PARTIES** - Before adding a new party into the database, **search to be sure the party is not already there!** It is recommended that you search using variations in spelling because the party may exist but may be spelled differently (e.g., Redd, Red, Read).
2. **ABBREVIATIONS:**
 - a. NEVER abbreviate the first word of the party name, including states. The only exception to this rule is United States of America is abbreviated "**USA**".

- b. Always use the two letter postal abbreviation for all states except when the state is the first word in the last name field. (Example: Connecticut Moving and Storage, Connecticut Shellfish)
- c. When abbreviating, use only the approved standard abbreviations appended to these instructions. **DO NOT USE A PERIOD WITH THE EXCEPTION OF JR./SR. AND FIRST, MIDDLE OR LAST NAME INITIALS.** If party is listed only by initials, enter last name initial in last name field and first name initial in first name field. Any additions to the standard abbreviations list must be approved by the System Administrator.

3. ALWAYS OMIT THE FOLLOWING:

- a. Articles **A, AN,** and **THE.**
- b. **Ms, Miss, Mr, Mrs** - All titles including Dr, Sgt, Col, should be entered in the party text field.

4. SPACING:

- a. Do not space or use periods if the title of a company contains capital letters. (Example: FDIC, AAA Asphalt Co, JJ Jones & Son)
- b. Do not space between letters or between the ampersand (&) in company names if the company name contains capital letters. (Example: A&P, SAM&B Co)

STANDARD ENTRIES

1. AGENCIES

If the head of the department is named in his capacity as the department head, enter the name of the department head in the party text record. If both the department and the head of the department are named as separate parties, enter each one separately.

<u>Last Name</u>	<u>First Name</u>
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Agriculture	Dept of
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<u>Last Name</u>	<u>First Name</u>
Transportation	Dept of

Party Text: John Smith, Sec

Last Name
Social Security Adm

Party Text: John Smith, Sec

If the department head is named but the agency is not named, index the name of the person and put their title in the party text.

<u>Last Name</u>	<u>First Name</u>
Gonzalez	Alberto

Party Text: Attorney General

<u>Last Name</u>	<u>First Name</u>
O'Connor	Kevin

Party Text: U.S. Attorney

2. CITIES & TOWNS:

As a general rule **DO NOT ADD ANY CITY OR TOWN TO THE DATABASE.**

If the name of the city or town is part of the department name, it should be entered in the last name field only. If 'Connecticut' is listed following the cities or towns, omit it. If a city or town is a named party, SEARCH FOR THE CITY OR TOWN FIRST AND SELECT THE ONE THAT APPLIES.

<u>Last Name</u>	<u>First Name</u>
Suffield Bd of Ed	
New Haven Police Dept	

3. **INDIVIDUAL/OFFICIAL CAPACITIES:** Enter the name of the individual as usual. Indicate the capacity in the party text record.

<u>Last Name</u>	<u>First Name</u>	<u>Party Text</u>
Walsh	John	Police Ofcr, Htfd, I/O

4. **ESTATES/ADMINISTRATORS/EXECUTORS**: Enter the executor or administrator in the last, first, middle and generation fields with the descriptive information in the party text record as follows (If a party is listed individually as well as an administrator or executor, Enter the party ONLY **once** and note "I/O" as the capacity in the party text):

<u>Last Name</u>	<u>First Name</u>	<u>Party Text</u>
Smith	John	Exec Est of Mary Smith
Brown	Betty	Admin Est of John Brown, I/O (<i>named individually and as an administrator</i>)
Williams	Jane	Est of

5. **MINORS/TRUSTEES**: Enter the name of the individual as usual. Enter the descriptive information in the party text record.

<u>Last Name</u>	<u>First Name</u>	<u>Party Text</u>
Smith	Elaine	ppa Susan Smith, a minor
Smith	Susan	Trustee Est of Sam Smith
Jones	Betsy	o/b/o minor child, J.S.
Jones	Kenneth	by & through his parents/next best friend, John Smith

6. **ADMIRALTY CASES**: Enter the name of the boat followed by the type of the boat in the last name field only. Omit anything concerning tackle, engines, apparel, etc.

Last Name

Golden Sails, M/V
VanSteenbergen, Sailboat

7. **GENERATIONS**: Enter the name as usual. Enter the generation (Jr., Sr., III) in the generation field using periods as necessary.

8. **UNIONS & FUNDS**: Enter under the name of the pension fund in the last name field. Enter the fund under the type of fund:

<u>Last Name</u>	<u>Party Text</u>
Plumbers & Pipefitters	Local 959

Health Fund

Trustees, Plumbers & Pipefitters, Local
959

Local 713

9. **RECEIVERS/LIQUIDATORS:** Enter under the name of the Company with the name of the receiver/liquidator in the party text:

Last Name

Hartford Insurance Co.

Family Guaranty Life Insurance Company

Party Text

Carol James as receiver of

Mississippi Comm of Ins George Dale,
as liquidator